

**CMAP Request for Proposal No. 054: Development and Execution of the Communications Strategy for the CR3 Program:
Summary of Pre-bid questions and answers.**

On October 12, 2010 CMAP held a Pre-bid discussion meeting for RFP No. 054. Interested persons attended in person or via webinar. The following is a recap of the questions asked and the answers provided. It is not an exact transcription, but closely summarizes the question and answer portion of the meeting.

- Can you provide some insights into the projected budget?
 - ✓ We are not providing a specific budget. We are asking applicants to provide a budget that they feel best aligns with the scope of services. Should modifications be needed, budget negotiations will be made accordingly.
 - ✓ Within the RFP there is a summary document for CR3 provided in a link. This document breaks the budget into three categories: information, financing and workforce. The scope of services within this RFP falls within the information category which has a budget of \$6,550,000. However, other aspects of the CR program are also included within that budget item including items such as energy audit tools, the web-based information system, and funding to community-based organizations to carry out outreach activities.
- Has the implementation agency been selected?
 - ✓ The implementation agency selection is pending CMAP Board approval, which is scheduled to meet tomorrow morning (October 13th). Following Board approval the implementation agency selection will become public information.

Update: On October 13, the CMAP Board of Directors approved awarding a contract to CNT Energy- a division of the Center for Neighborhood Technology (CNT) as the lead implementation agency.
- Is there existing energy consumption data being gathered that will be used as a benchmark for tracking success?
 - ✓ CMAP and the Chicago Region Retrofit Steering Committee collects and analyzes energy consumption data from a number of sources and we intend to use this baseline data in assessing the success of the overall CR3 program Data analysis of energy consumption data to track program success does not fall within the scope of this RFP.
- Do we understand correctly that the communications program will be rolled out sequentially, targeting two communities per year over the three-year period? What's the rationale?
 - ✓ That is correct. As the RFP states that the work components include "development, execution and testing of broad based branding campaign, broad regional outreach strategy and target communications efforts for commercial and industrial sector, and customized outreach strategies for six target communities". We believe that the most effective way to deploy the CR3 program is to test and

adjust various strategies over the grant period thus a phased execution strategy in the target communities. This is modeled after the Energy Action Network.

- How do you define community?
 - ✓ We do not have an explicit definition, as we are open to different types of communities, beyond geographic. We will work with the selected firm to further define community.
- Has the CR3 Committee already established partnerships with the CBOs and trade ally organizations that will help drive the communications program or is that the charge of the selected firm?
 - ✓ As the RFP states in the scope of services and submittal requirements on page 13 - Firm(s) submitting for the outreach component in the scope of services should bring forth a team that includes energy retrofit trade ally partners that can effectively communicate outreach strategies to the commercial and industrial (C&I) building sectors (for example trade organizations or Chambers of Commerce). Firm(s) should include in this proposal response the funds needed to support the activities (within the budget) of these partnerships with C&I trade allies. On the other hand, community-based organizations that will assist in deploying the targeted community outreach strategies will be funded through a separate funding stream and should not be identified or budgeted for within this budget proposal.
- Will you provide access to the existing bodies of energy efficiency research noted in the RFP?
 - ✓ Applicants should be familiar with CMAP's [GO TO 2040 plan](#), [the Chicago Climate Action Plan](#), and the [Creating a Regional Building Energy Efficiency System](#) (by CNT), and the [Chicago Region Energy Snapshot](#) (by CNT for CMAP) to better understand the foundation of the CR3 program. Beyond that, we would expect that a full literature review would be part of the market research scope of services as described on page 7 of the RFP.
- Do you have information on current energy efficiency programs that have been most effective in the CR3 region?
 - ✓ Again, we are looking to firms to provide for that information and it would fall within the scope of services in the market research category on page 7.
- Has a firm been selected to develop the Website? Is this something that can be included as part of the response, realizing that it is not funded under this specific RFP?
 - ✓ The firm has not been selected to develop the website. No- the website development will be selected through a separate request for proposal process.
- What is the division of responsibilities as far as front- end development and back-end development? Is web-design included in this scope?
 - ✓ The scope of this RFP is to design the logos, graphics and messaging for the information system, but the actual web development will be selected through a separate RFP.

- How many languages will communications materials need to cover?
 - ✓ We anticipate that the exact number of languages will be determined in the development of the communications and marketing strategy within the scope of services but three to four languages would be a good estimate.
- Are there specific goals in terms of the amount of reduced energy consumption or the uptake in retrofits?
 - ✓ The CR3 goals are outlined on page 2 of the RFP
 - ✓ There are also specific goals set for by the Chicago Climate Action Plan which can be found on page 3 of the RFP and with CMAP's *GO TO 2040* plan
- Attachment 3, Section L: As part of the market research, will the vendor need to submit its full protocol/methodology to the Office of Management and Budget (OMB) for approval in order to engage in research with the general public? If so, has time required to obtain OMB approval been accounted for in the proposed timeline? It is our experience that OMB approval can take up to 90 days.
 - ✓ At this time, we do not believe that a full protocol needs to be submitted to OMB for approval. Should we find this to be the case; we will adjust the project timelines accordingly.
- What are the desired outcomes of the branding/communications efforts? The RFP states the outcomes of the overall campaign as: retrofit at least 8,000 units of residential/commercial/industrial properties; leverage more than \$500 million in local investments, and create more than 2,000 jobs. We assume that the outcomes of the branding/communications efforts will be connected to these outcomes but not one and the same.
 - ✓ As stated on Page 9 of the RFP- "CMAP and the Implementation agency will work closely with the selected firm to formulate a clear implementation strategy and timeline for execution". We expect that this process will include developing key performance indicators and expected outcomes as described on page 10.
- What other behaviors or attitudes should the vendor measure and track over time to further measure success?
 - ✓ We feel that this falls within the scope of services under market research and communications strategies. We are looking for the selected firm to tell us that.
- What types of market/opinion research data already exists on this topic and with which audiences was it conducted? Will these results be shared?
 - ✓ Again, we feel that this falls within the scope of services under market research and communications strategies.
- What, if anything, is already known about potential target audiences in terms of demographics or other characteristics? Can this information be shared during the proposal process?
 - ✓ See above

- The RFP mentions “ethnographic” research in several places within the RFP. What is CMAP’s definition of ethnographic research?
 - ✓ As the RFP states on page 8 that the goal of the ethnographic research will be to gain an in-depth understanding of people’s behaviors and attitudes by studying them in the context of their daily lives”. We feel this is a sufficient definition of ethnographic research.
- Who or how many individuals would be responsible for reviewing and approving documents / methods related to the research? In particular, what type of time frame (e.g., one business day or one business week) can we anticipate for review/approval of research documents/ procedures? Given the time frame in which the research needs to be executed (90 days), we want to propose a research plan that is achievable based on the time CMAP needs to review and approve relevant research documents (e.g., plan for conducting focus groups; focus group discussion guide; survey questionnaire script).
 - ✓ The CR3 project team will work to expedite all processes given that we are the party responsible for setting the tight timeframes. Please base the proposed research plan on what the firm feels it is able to produce.
- What are the specific, anticipated reporting requirements that CMAP and/or the U.S. Department of Energy will have for this program as part of the Better Buildings Initiative? During what timeframes will recurring reporting be required?
 - ✓ As stated in the RFP on page 5, monthly progress reports will be submitted to the implementation agency, and page 9 describes the data reporting requirements through the Department of Energy which is yet to be finalized.
- The RFP references that “a user-friendly comprehensive informational website” will be “developed by a separate team.” Has this team already been selected? Or will this team be chosen via another RFP process? (We would prefer both to create the broader communications plan that includes the website and to build and manage the website itself.)
 - ✓ This team has not been selected and it will be a separate RFP process. The RFP has not yet been released.
- To what extent will personnel from the member organizations of the Chicago Region Retrofit Steering Committee be available to participate in the program with the selected agency, beyond simply providing program oversight? (It may be useful to have individuals and/or small teams from these organizations be available to participate in the development and execution of various aspects of the program.)
 - ✓ The Retrofit Steering Committee members provide policy guidance to the CR3 programs. Your proposals should not assume that any additional time will be dedicated by steering committee members to the development and execution. However, steering committee members are committed to this project and will be very involved in the process

- Have any technical platforms or approaches been selected relative to the information system, the website(s), mobile devices, or related digital activities? If none have been selected, are any platforms preferred?
 - ✓ No. This RFP is in development and has not been released.
- Other than standard business practices, are there any specific guidelines we should keep in mind relative to physical or digital security, the storage of personally identifiable information, physical and/or digital document retention requirements, or other information management protocols? If so, are CMAP and/or U.S. DOE policies relative to this topic available for our review?
 - ✓ We do not anticipate the need for personally identifiable information to be transferred to CMAP or any CR3 partners however, if this is the case we will follow all federal guidelines applicable.
 - ✓ Document retention guidelines under the ARRA program can be found here: <http://ecfr.gpoaccess.gov> under 10 CFR 600.153
- Is CMAP familiar with any existing programs that are similar to this which it admires, whether as part of the Better Buildings Initiative or other, similar programs?
 - ✓ There many existing programs that the CR3 partners hope to exchange information and learn from including other BetttterBuildings Initiative recipients in California, Pennsylvania, Austin, Portland, Wisconsin and Michigan.
- Is funding for the community based outreach separate or included in this scope of services?
 - ✓ The community based outreach through community based organizations is separate but the outreach through trade allies is included.
- When will the RFPs for the community based outreach be issued?
 - ✓ Additional RFPs will be issued in the next several months but we want the communications strategy to inform the community based outreach selection process.
- How many people were sent this RFP? How many people are attending this webinar?
 - ✓ We sent the RFP to a mailing list of about 400 and also make it available on our website which has about 400 additional subscribers. We are not able to know how many people receive it through other channels. About 40 people are in the room and we don't know off-hand how many are on the phone. Are there other corresponding energy efficiency programs that project partners are involved in, and are there other retrofit programs that the partners are not involved in?
 - ✓ Yes, there are programs that exist beyond what the project partners are involved in.
- Will existing market research be made available so that there is no duplication?
 - ✓ Once the selected firm is on-board, we will work to build on what exists and avoid duplication

- In order to submit a smart proposal and research plan will this information be made to firms submitting proposals?
 - ✓ We included a list of a few of the most fundamental reports that serve as the basis for the CR3 (CCAP, GO TO 2040, etc.) but we expect you to conduct your own research to develop a smart proposal and research agenda.
- Is there a portion of the budget reserved for paid media? Should we include paid media costs the net or gross budget?
 - ✓ There is not a reserved portion of the budget for paid media and any and all project costs should be included in the complete project budget.
- Can you elaborate on the activities not included in this scope of work but are part of the overall \$6.5 budget for increasing access to information?
 - ✓ The information system is not included in this scope which is a web-based tool where comprehensive retrofit information is available and provides building owners the information they need to obtain a retrofit from start to finish. The audit tools are also not included in this scope and will be one of the information tools featured on the information system. The implementation of community based outreach strategies is also not included in this scope, except for outreach through trade allies. Development of the strategy to drive implementation of community based outreach is included, but a separate RFP will be issued to solicit implementers of that strategy. We expect the firm that develops the strategy will work with the implementers to refine the strategy as needed.
- Are there any limitations on the type of tools used in outreach? Does the end goal (for example, reduction in kW/hr) restrict what type of messages are deployed?
 - ✓ No, we hope to deploy the tools and messages that are the most effective and the specific end goals are not restrictive.
- How are you weighing communities as far as which will be targeted?
 - ✓ We have a balanced approach which targets residential, commercial, and industrial. We are hoping market research will provide guidance on where we should be placing greater focus.
- How did you generate the 8,000 unit number?
 - ✓ Using average retrofit costs for different building types, we estimate 8,000 retrofits would be financed through the financing mechanisms created exclusively through the DOE funded CR3 program. This does not include the retrofits that will occur because of the information and workforce components, so it is a low count of program impact.
- Is there a cap on the number of and types of units that can be retrofit?
 - ✓ No

- Is the end goal to make information regarding retrofits and the benefits widely known across the region?
 - ✓ Yes
- Do you know if we have an appropriate number of contractors needed to meet the demand? How will this need factor into the communications strategy?
 - ✓ We have a good understanding of the current workforce and know many construction workers are out of work so we will be working to connect workers to the jobs generated, but that is not in the scope of this RFP.
- Considering the variety in types of energy saving measures, how do you define unit and retrofit?
 - ✓ The Chicago Climate Action Plan includes information on this, but generally we expect on average a retrofit to provide a 30% reduction in energy consumption.
- How are you defining your audience? Because there is a variety in type of residents, energy consumption, and financial ability to pay for retrofit activities, will you target a particular type of consumer?
 - ✓ No, all types of energy consumers are fair game.
- While there are a range of energy efficiency programs, if the research finds there are gaps, will new programs be created to fill gaps?
 - ✓ It is possible new programs will come about as a result of this research, but we are hoping to better connect people to existing resources and make better use of what we currently have.
- Can you expand on the selection criteria and what you will be looking for in the methodology and project approach?
 - ✓ The more information and details you provide on how you will execute the scope of work, the better. Proposals that reword the information we've provided to you will not be as competitive. We are looking for details on how you will achieve the desired outcomes.
- How do you define trade allies? Are they exclusive to construction trades? Can trade allies include ethnic media? Are business organizations considered trade allies?
 - ✓ Trade allies can include a range of entities; we are looking for the trusted messengers that have relationships with building owners and can provide the necessary outreach to increase retrofit activity.
- It's clear two communities will be targeted for targeted outreach each year, but will the outreach to the first two communities continue onto the second year and third year?
 - ✓ Yes, all communities will continue outreach activities for the duration of the program.

- Can we access information on the contractors and retrofit suppliers to help in developing our proposals?
 - ✓ Once the firm is selected, we will make our information available but prior to that we ask you conduct your own research.
- Regarding the length of the program, is it three years or two and a half?
 - ✓ The contract CMAP has with U.S. DOE is a three year contract that began in May of 2010. The contract with the communications strategy firm will go until May 18, 2013, so will be approximately two and a half years.
- The dollar amounts allocated for each of the three components of the program (finance, info, workforce) does not add up to \$25 million. Why is this?
 - ✓ We have money reserved for administration and the implementation agency.
- Should the community based strategies be replicable in all communities or will you want to target different types of communities?
 - ✓ We are open to targeting different types of communities and we will look to the market research and communications strategy to help guide us in which types of communities we should target.
- What kind of on-going support is needed?
 - ✓ Once the initial strategy is developed we will want the firm to work with the implementers and conduct ongoing impact assessments and make refinements as necessary.
- Will code and licensing barriers be addressed through this scope?
 - ✓ No but those barriers may help inform the strategies.
- If firms apply together is it possible you will select pieces from a team and assemble a different team?
 - ✓ We will use the evaluation process to help us determine if we will select different firms for the three different components. Firms are eligible to appear as subcontractors in more than one proposal.
- Can you describe what kind of leverage you are looking for? Do sponsorships count as leverage?
 - ✓ Involvement in other relevant projects or experiences that will assist in your ability to bring additional resources to execute the scope outlined in the RFP can be considered as leverage. Sponsorships are considered as leverage.

- If proposals include case studies will these be part of public domain? Do you provide non-disclosure agreements?
 - ✓ We treat proposals and all that is included as confidential material to the extent legally possible. However, all proposals are subject to the Illinois Freedom of Information Act (FOIA). The proposals are exempt from FOIA until an award or final selection is made. If there are trade secrets and commercial or financial information included in the proposal and the proposer has claimed that disclosure of the trade secrets or commercial or financial information would cause competitive harm to the person or business, an exemption to FOIA is permitted for only the identified records.
- Since there are three buckets to the program and they all intersect, will it be possible for a firm with expertise in one area to focus on that area or should we propose to address all in the scope?
 - ✓ No, a firm or team of firm must bid on one or more of the entire work scope components in their proposal (not just pieces of each). It is the preference of CMAP to contract with one firm, however, CMAP reserves the right to enter into contract with one or multiple firms.
- Can we change certain pieces of the terms and conditions of the contract in the proposal?
 - ✓ No, we would prefer that you do not propose different terms and conditions in the proposal. There is room for contract negotiation with the recommended firm(s), although the Federal Assurances cannot be changed nor negotiated.
- Is there a preferred format or template for letter of commitment for partners within a team?
 - ✓ No. We just ask for documentation from your partners that they are committed to performing the activities proposed.
- Is there a set-aside for minority and women owned enterprises?
 - ✓ We ask proposals to include on Attachment 2: "Information to be provided by Bidder", if they have this designation, although there is not a specific set-aside for MBE/WBE firms.
- Price Proposal Form, Under Pay Rate do you expect hourly or annual and under Time do you want hours?
 - ✓ We ask proposals to include hourly pay rates and include hours under Time.
- Is the RFP response considered a document proprietary after submittal? How can we protect our proposal from being obtained by our competitors?
- Are the attachments to the RFP response, which includes material from prior assignments with other clients protected information, or will it become the property of CMAP?

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